Tracking Board

The Tracking Board shows all appointments that were scheduled on the current day and tracks patients throughout the episode of care until patients check out.

In addition to performing the basic tasks of checking patients in and out, you can also:

> Verify and update patient information as necessary, including demographic, guarantor, and insurance information.
> Review and update appointment information.
> Set up referrals to other clinics and providers.
> Add walk-in patients.

Tracking Board processes

The Tracking Board monitors patients on the day of their appointment until the patients are checked out.

Patients are added to the Tracking Board on the day of their appointment. Walk-in patients are displayed as soon as you create their records. If your practice includes multiple locations, you can view appointments in a single location or appointments across all locations.

Before patients arrive

Before a patient arrives for an appointment:

> Review details about the appointment and, if necessary, cancel or reschedule it.
> Review and update the patient's registration record.
> Flag an appointment as "no show" if the patient does not arrive or cancels the appointment within the time specified in the **No show time limit** field for the location

When patients arrive

When patients arrive for an appointment, place them in the waiting room. You must review and verify the following encounter details and collect and post copayments:

> Demographics
> Guarantors
> Insurance information

When patients are ready to be checked in

After the encounter details are updated and verified and the patient is in the waiting room, you can check in the patient. The patient is now ready to be called back to see the provider. While the patient is checked in, you can review the encounter details and make any additional updates.

After patients are called back for care

After the patient has been called back for care, change the patient's status to **Active**. You can also review the encounter details and make any additional updates, including the patient's room.

When the appointment is complete

When the appointment is complete, check out the patient or provide additional information such as “patient left without medical treatment.” The check-out process includes:

> Verifying final changes to the encounter details
> Attaching any relevant notes to the visit
> Setting up any required referrals
> Reviewing and setting up future appointments

Visit and encounter numbers

Each nonrecurring appointment is assigned a unique visit number. This number is assigned either when the appointment is first scheduled or when the patient is placed in the waiting room, based on how the location is set up in Practice Administration.

All linked recurring encounter types display the same visit number with a unique encounter number. For example:

> You schedule an Obstetrics appointment for a patient. This appointment is assigned a visit number at the time of scheduling.
> When the patient arrives for the appointment and is placed in the waiting room on the Tracking Board, you can flag the visit as the first encounter in a series of recurring Obstetrics appointments.
> You can link any future appointments scheduled for that patient to the original visit until the visit is billed. In this case, you do not create a separate visit for each linked appointment. Instead, you create a new encounter and link it to the original visit.